

# **Medical and Vocational Expert User Guide**

## **ERE for Experts: Access Claimant's Electronic Folder**



**September 2021**

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## **Overview**

This guide provides Medical and Vocational Experts (ME/ VEs) with detailed instructions for viewing, downloading, and uploading documents in claimant's electronic folders (eFolders).

### **Requirements for ERE eFolder Access**

You meet the criteria for ERE eFolder access if you are a Medical or Vocational Expert (ME/VE) who has:

- Been awarded a Blanket Purchase Agreements (BPA) with the Social Security Administration (SSA), or work for a company with a BPA
- Received a favorable letter from the SSA Personnel Security & Suitability office
- Successfully registered for an Extra Security **my Social Security** account online through the ssa.gov official website
- Been assigned an Interrogatory and/or been scheduled to testify at a Hearing for a disability case

### **ERE Hours of Operations**

ERE for Experts is available during the following hours:

#### Online Hours of Operation

Monday - Friday 5 AM - 1 AM ET

Saturday 5 AM - 11 PM ET

Sunday 8 AM - 11:30 PM ET

**Federal Holidays** - Same hours as the day of the week the holiday occurs

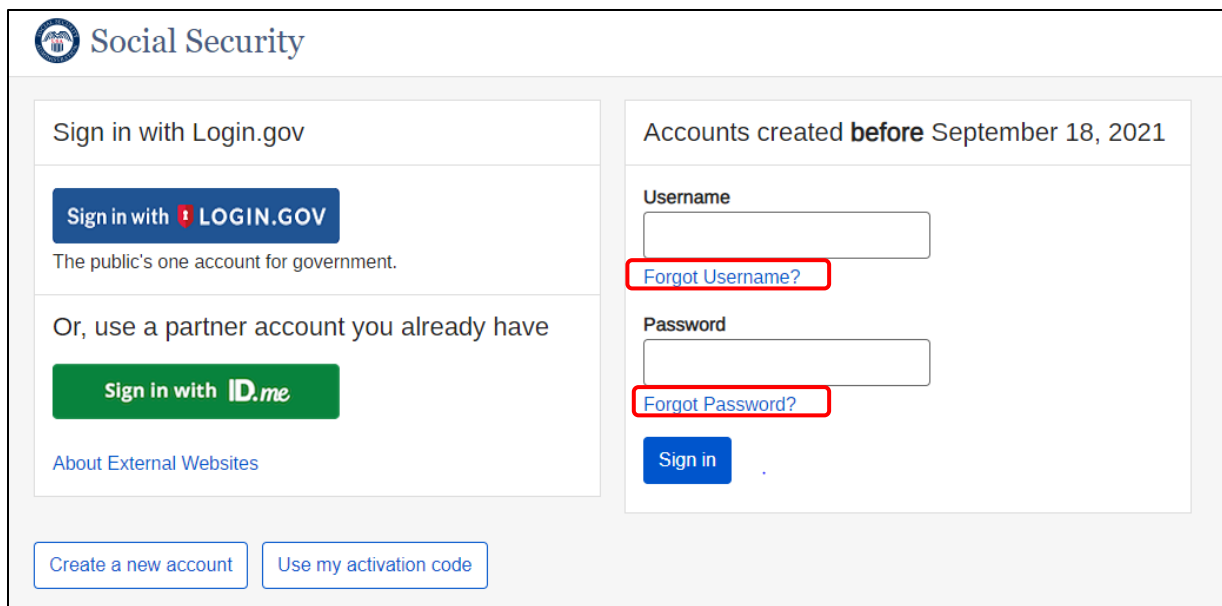
### **Signing into ERE for Experts**

Sign into your ERE for Experts account using this link - <https://secure.ssa.gov/ERECA/MEVE01View>.

You will sign in with the Username and Password you created when you registered for **my Social Security**. During sign-in, you must have access to the text-enabled cell phone you provided during **my Social Security** registration.

## Forgot Username or Password

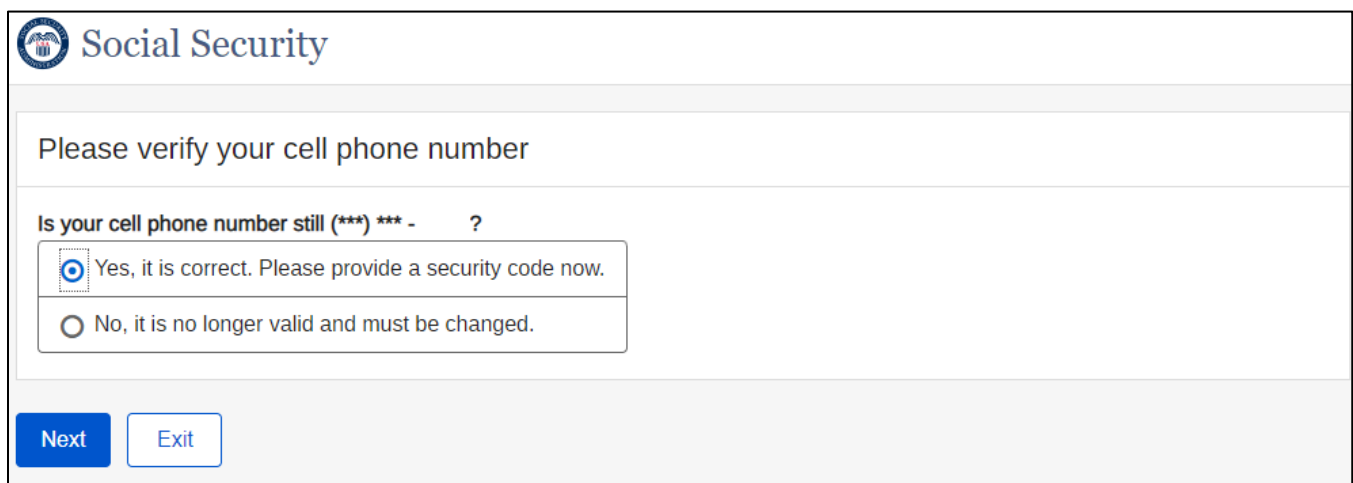
If you have forgotten either your Username or Password, select the *Forgot Username* or *Forgot Password* link on the **Sign In** screen, and follow the instructions.



The screenshot shows the Social Security Sign In page. On the left, there are two main sections: 'Sign in with Login.gov' featuring a blue 'Sign in with LOGIN.GOV' button and the text 'The public's one account for government.', and 'Or, use a partner account you already have' featuring a green 'Sign in with ID.me' button and a link to 'About External Websites'. At the bottom left are links for 'Create a new account' and 'Use my activation code'. On the right, under the heading 'Accounts created before September 18, 2021', there are input fields for 'Username' and 'Password'. Below each field is a red-bordered link: 'Forgot Username?' and 'Forgot Password?'. A blue 'Sign in' button is at the bottom right of this section.

## Extra Security Sign In

You will be asked to verify your cell phone number, select “Yes, it is correct. Please provide security code now. DO NOT try to change your phone number here, you must log into your personal account to make the change.



The screenshot shows the 'Extra Security Sign In' page. It features the Social Security logo and the heading 'Please verify your cell phone number'. Below this is a question: 'Is your cell phone number still (\*\*\*) \*\*\* - ?'. There are two radio button options: 'Yes, it is correct. Please provide a security code now.' (which is selected) and 'No, it is no longer valid and must be changed.'. At the bottom, there are two buttons: 'Next' and 'Exit'.

You will receive a security code on the text-enabled cell phone number you provided during your **my Social Security** registration. Enter the security code and submit.

**NOTE:** Delete the text message after it is used. It is a one-time code and is valid for only 10 minutes.

**IMPORTANT:** Do not request to “disable extra security” because you will no longer be able to access claimants’ eFolders.

**Social Security**

**i** We sent a text message to (\*\*\*). Please allow up to 2 minutes for the security code to arrive. The security code will **expire** 10 minutes from the time of your request.

Please enter your security code

[Having trouble?](#)

Enter the security code you just received.

**Submit Security Code** Previous Exit

## Terms of Service

You must read and agree to the **my Social Security Terms of Service**, then select **Next**.

**NOTE:** These **Terms of Service** apply to all **my Social Security** customers with personal accounts. However, you cannot access your personal **my Social Security** services (like Online Statement) when you sign in using the specialized ME/ VE link <https://secure.ssa.gov/ERECA/MEVE01View>.



## Signing in...

### Terms of Service

- I am using this service with the account that I created myself using my own personal information and identity. I am not using an account created by another person or created using another person's information or identity, even if I have that person's written permission.

I will never share the use of my account with anyone else under any circumstances. I will never use another person's account.

- I understand that this computer program contains U.S. Government information.
- I consent to the monitoring and recording of my use of this program to ensure its appropriate use.
- I understand that it is a federal crime to:
  - Give false or misleading statements to obtain information in Social Security records; or
  - Deceive the Social Security Administration of an individual's identity.
- I understand that unauthorized use of this service is a misrepresentation of my identity to the federal government and could subject me to criminal or civil penalties, or both.
- I understand that Social Security may stop me from using these services online if it finds or suspects misuse.
- I accept that the responsibility to properly protect any information provided to me by Social Security is mine and that I am the responsible party should any information on or from my computer or other device be improperly disclosed. I agree that Social Security is not responsible for the improper disclosure of any information that Social Security has provided to me, whether due to my negligence or the wrongful acts of others.

### Social Security is Going "Green"

With your [my Social Security](#) account, you can immediately view, download, or print your Social Security Statement. Your online *Statement* contains the most up-to-date information in our records about your earnings and benefit.

Remember, now that you have a [my Social Security](#) account, you will no longer receive a paper *Statement* in the mail. If you need a *Statement* by mail, please [follow these instructions](#).

☐ I agree to the Terms of Service.

Next

Exit

# Navigating Electronic Records Express (ERE) for Experts

## Electronic Records Express (ERE) Home

The screenshot shows the ERE Home page with the Social Security Administration logo and title. The main heading is 'Electronic Records Express (ERE)'. Below this, there are two sections: 'ERE System Alerts (0) – Updated: 05/16/2018' and 'What's New – Updated: 04/30/2016'. A link 'Receive ERE System Alerts Via Email' is present. The 'Electronic Folder Services' section includes links for 'Access Claimant's Electronic Folder', 'Pick Up Files', 'Track Status of Submissions', and 'Get Status Reports'. A 'Help & Support' section on the right provides user guides and FAQs, and a 'User Resources' link. A security notice at the bottom right advises logging out and closing windows.

**Social Security Administration**  
The Official Website of the U.S. Social Security Administration

### Electronic Records Express (ERE)

**ERE System Alerts (0)** – Updated: 05/16/2018      **What's New** – Updated: 04/30/2016

[Receive ERE System Alerts Via Email](#)

**Electronic Folder Services** ? [Help](#)

- [Access Claimant's Electronic Folder](#)
- [Pick Up Files](#)
- [Track Status of Submissions](#)
- [Get Status Reports](#)

**Help & Support**

User guides and FAQs are available in **User Resources** below.

For technical support, email [ODAR.ERE.Expert.Support@ssa.gov](mailto:ODAR.ERE.Expert.Support@ssa.gov). DO NOT include any Social Security Numbers (SSNs) in the email.

? [User Resources](#)

For your security, please log out and close all Internet windows when you are finished.

General ERE information is available to you on the ERE home page:

- **ERE System Alerts** notifies you of technical difficulties that may affect ERE performance.
- **What's New** informs you of the latest changes and updates to ERE.
- **Receive ERE System Alerts via Email** allows you to receive automated ERE updates via email, such as system unavailability.

The following **Electronic Folder Services** features are available to you:

- **Access Claimant's Electronic Folder:** select this link to view or download exhibited documents in the claimant's eFolder.
- **Pick Up Files:** select this link to retrieve downloads requested from the eFolder. Refer to the *Pick Up Files User Guide* for more information.
- **Track Status of Submissions:** select this link to view the status of uploaded file submissions.
- **Get Status Reports:** select this link to view or download status information for all your cases. Refer to the *Status Report User Guide* for more information.

Customer support tools are available:

- **Help & Support:** select the link to send an email to the help desk. Include your contact information, a description of the issue or question, and an applicable screen shot. DO NOT include Social Security Numbers in your email.

- **User Resources:** select this link for Frequently Answered Questions (FAQs), User Guides, and tips for users with disabilities.
- **SSA Helpdesk:** 800-772-1213 for issues with the My Social Security website. Operations hours are 7:00am to 12:00am eastern time, Monday through Friday.

### Access Claimant's Electronic Folder

On the ERE home page, select the **Access Claimant's Electronic Folder** link under **Electronic Folder Services**.

### Electronic Folder Agreement

You must read the terms and conditions about ERE access, enter the claimant's Social Security Number (SSN), and then select the **I Agree** button. You will find the claimant's SSN on the notice we mailed to you.

## ERE: Electronic Folder Agreement

### Acknowledgement for Online Services

**By entering this United States Government website, I agree to the following terms and conditions:**

- I agree to use this service only to access the records that are necessary to complete my work on the cases that the Social Security Administration (SSA) has assigned me. I will not disclose any of the information or data that I access through this service unless Federal law or regulations authorize me to do so.
- I agree that I will not enter this service unless I have installed anti-virus software, anti-spyware software, and personal firewalls on the computer or device I am using. I will regularly update the operating system, application software, and security software of the computer or device that I am using to maintain the latest data protection.
- I will not store my Username and Password for this service on my computer or device and will take precautions to avoid dissemination of my Username and Password for this service.
- I understand that there could be criminal and civil penalties if I: misuse this system, improperly access information or data, improperly disclose information or data I access, fail to take proper measures to protect information or data from improper disclosure, or furnish false or misleading information to SSA.
- I understand that use of the certified electronic folder may be monitored, recorded, and audited.

**By providing the claimant's Social Security Number (SSN) to access his or her electronic folder and selecting the "I Agree" button, I certify that I have read, understand, and agree to the above statements.**

**Claimant's Social Security Number (SSN):**



## Claimant eFolder

The **Electronic Folder** contains a header that lists case-specific information: the claimant's name and SSN, claim type and level, Hearing Office site code with jurisdiction of the case, and several pertinent dates.

The eFolder initially displays with all exhibits hidden. Medical and Vocational Experts have access to three sections of the eFolder:

- **Section A. Payment Documents/ Decisions:** Contains disability determination notices.
- **Section E. Disability Related Development:** Contains the Disability Reports, Vocational Reports, Medical Release forms, and Activities of Daily Living (ADL) forms.
- **Section F. Medical Records:** Contains all exhibited medical evidence from all levels of the disability claim (initial, reconsideration, and hearing).

The screenshot shows the Social Security Administration's ERE: Electronic Folder interface. At the top, the user is logged in as JOHN CCAKDZS with a 'Sign Out' link. The page header includes the Social Security Administration logo and the text 'The Official Website of the U.S. Social Security Administration'. The main heading is 'ERE: Electronic Folder'. Below this, a summary box displays claimant information: Claimant: John Samuel, Level: Hearing, Application: 11/18/2013, Claimant SSN: [redacted], Last Insured: 12/31/2014, Claim Type: T2, T16, Last Change: 04/11/2016, and Alleged Onset: 09/13/2010. A 'User Resources' link is also present. The 'Exhibit List (16)' section includes buttons for 'Show All', 'Hide All', 'Select All', and 'Deselect All'. Below these are three expandable sections: 'A. Payment Documents/Decisions' (10 items, 3 pages), 'E. Disability Related Development' (0 items, 0 pages), and 'F. Medical Records' (6 items, 3 pages). At the bottom, there are buttons for 'Download Selected to ZIP', 'Download Selected to PDF', 'Upload New File', and 'New Case Search'. An 'ERE Home' button is located at the very bottom.

## Exhibit List Options

**View an Individual Document** - You can open and view individual documents immediately by clicking on the description link.

**Show All / Hide All** - Select the **Show All** button to open all sections and display all documents. Select the **Hide All** button to close all sections.

**Show/ Hide by Section** – To the left of each section name is a blue square. Select the plus sign to open that section and display the documents. Select the minus sign to close that section.

**Select All / Deselect All** - Select these buttons to mark or unmark all documents in all sections. A selected document will be marked with a checkmark in the first column.

**Select / Deselect Individual Documents** – You can select / deselect individual documents by checking / unchecking the box in the first column.

The screenshot shows the Social Security Administration's ERE: Electronic Folder page. At the top, there is a header with the Social Security logo and the text "The Official Website of the U.S. Social Security Administration". Below the header, the page title "ERE: Electronic Folder" is displayed. The main content area contains a summary of the claimant's information: Claimant: John Samuel Polite, Claimant SSN: 223-50-1302, Last Change: 04/11/2016, Level: Hearing, Last Insured: 12/31/2014, Alleged Onset: 09/13/2010, Application: 11/18/2013, and Claim Type: T2, T16. There is a "User Resources" link. Below this, there is an "Exhibit List (16)" section with buttons for "Show All", "Hide All", "Select All", and "Deselect All". The exhibit list shows three sections: A. Payment Documents/Decisions (Items: 10, Page Count: 3), E. Disability Related Development (Items: 0, Page Count: 0), and F. Medical Records (Items: 6, Page Count: 3). At the bottom, there are buttons for "Download Selected to ZIP", "Download Selected to PDF", "Upload New File", and "New Case Search". A "ERE Home" button is located at the very bottom.

Section	Items	Page Count
A. Payment Documents/Decisions	10	3
E. Disability Related Development	0	0
F. Medical Records	6	3

## Downloading Documents

You can select documents from the eFolder to download and save to your personal or work computer.

Select documents to download by checking the box beside each individual document or by clicking the **Select All** button. You can choose to download the documents to either a ZIP or PDF. There is no difference in download times between PDF and ZIP files.

Exhibit List (16)

Show All

Hide All

Select All

Deselect All

+ A. Payment Documents/Decisions

Items: 0

Page Count: 0

+ E. Disability Related Development

Items: 10

Page Count: 4

- F. Medical Records

Items: 6

Page Count: 3

<input checked="" type="checkbox"/>	#	Description	Source	Date From	Date To	Received	Marked	Pg
<input checked="" type="checkbox"/>	1F	Medical Evidence of Record - MER				Prior to Hearing	Y	1
<input checked="" type="checkbox"/>	2F	Medical Evidence of Record - MER				Prior to Hearing	Y	0
<input checked="" type="checkbox"/>	3F	Medical Evidence of Record - MER				Prior to Hearing	Y	1
<input checked="" type="checkbox"/>	4F	Medical Evidence of Record - MER				Prior to Hearing	Y	0
<input checked="" type="checkbox"/>	5F	Medical Evidence of Record - MER				Prior to Hearing	Y	0
<input checked="" type="checkbox"/>	6F	Medical Evidence of Record - MER				Prior to Hearing	Y	1

Download Selected to ZIP

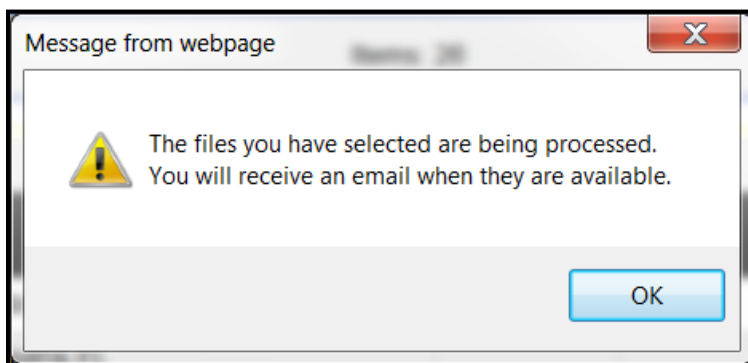
Download Selected to PDF

Upload New File

New Case Search

ERE Home

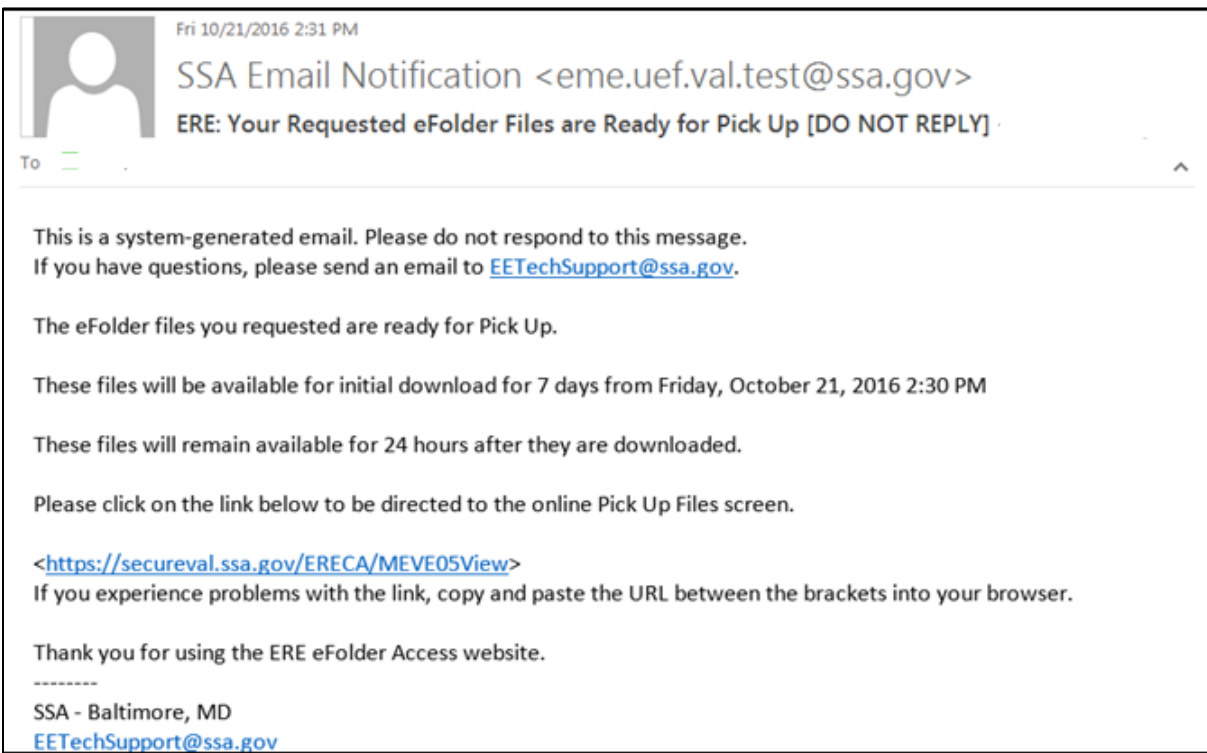
You will receive the following message after you request a download:



## **Pickup Files**

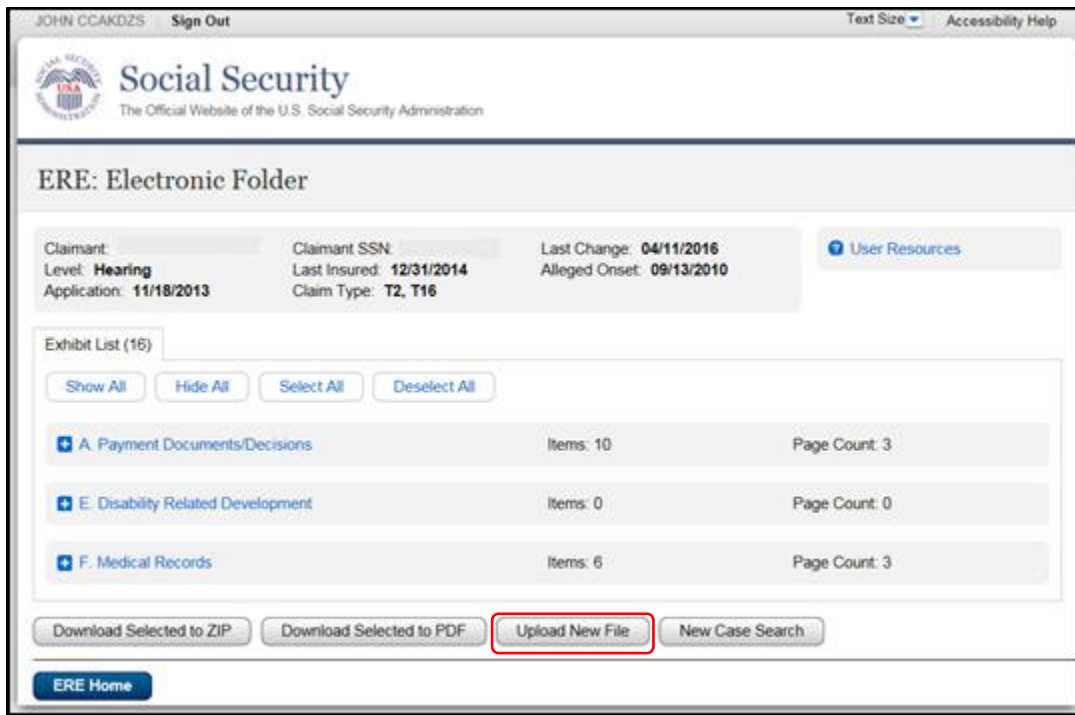
You will receive an email message telling you that the files you requested are ready for pick up (DO NOT REPLY), keep in mind for larger files it can take up to 48 hours. The link will take you to the ERE for Experts login.

Follow the ***Pickup Files User Guide*** available under **User Resources**.



## Uploading Documents

Once inside the electronic folder, upload new documents by selecting the Upload New File button.



JOHN CCAKDZS Sign Out Text Size Accessibility Help

**Social Security**  
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**ERE: Electronic Folder**

Claimant: Level: **Hearing** Application: **11/18/2013** Claimant SSN: Last Insured: **12/31/2014** Claim Type: **T2, T16** Last Change: **04/11/2016** Alleged Onset: **09/13/2010** [User Resources](#)

Exhibit List (16)

Show All Hide All Select All Deselect All

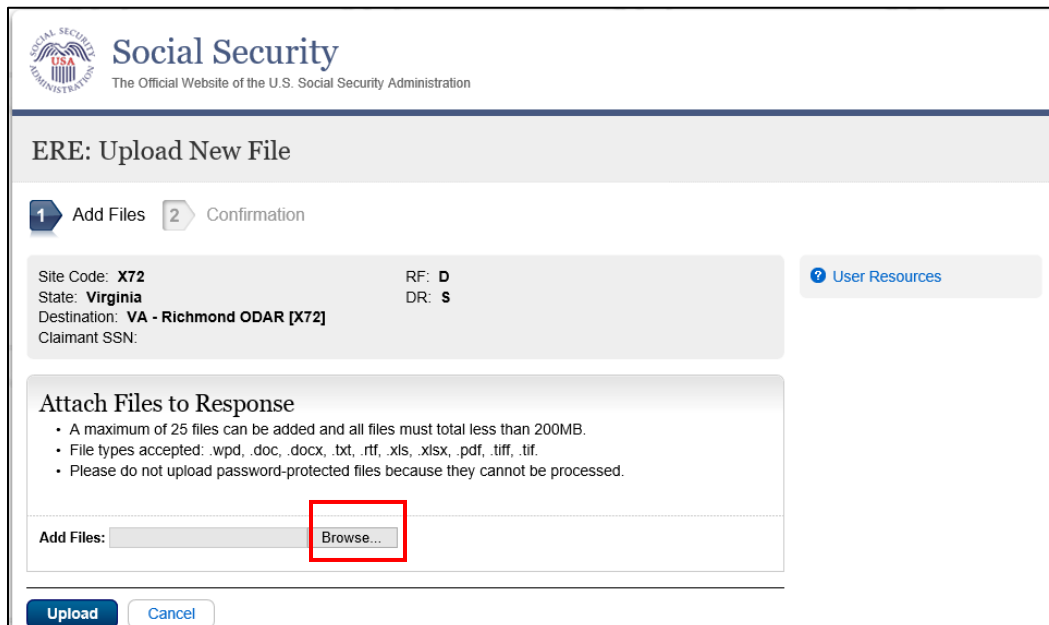
<a href="#">A. Payment Documents/Decisions</a>	Items: 10	Page Count: 3
<a href="#">E. Disability Related Development</a>	Items: 0	Page Count: 0
<a href="#">F. Medical Records</a>	Items: 6	Page Count: 3

Download Selected to ZIP Download Selected to PDF **Upload New File** New Case Search

[ERE Home](#)

The **Upload New File** button transfers you to the **Upload New File** screen.

**Step 1:** Attach files by selecting the **Browse** button. You will be prompted to choose a file from your computer.



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The Official Website of the U.S. Social Security Administration

**ERE: Upload New File**

1 Add Files 2 Confirmation

Site Code: **X72** RF: **D** [User Resources](#)  
State: **Virginia** DR: **S**  
Destination: **VA - Richmond ODAR [X72]**  
Claimant SSN:

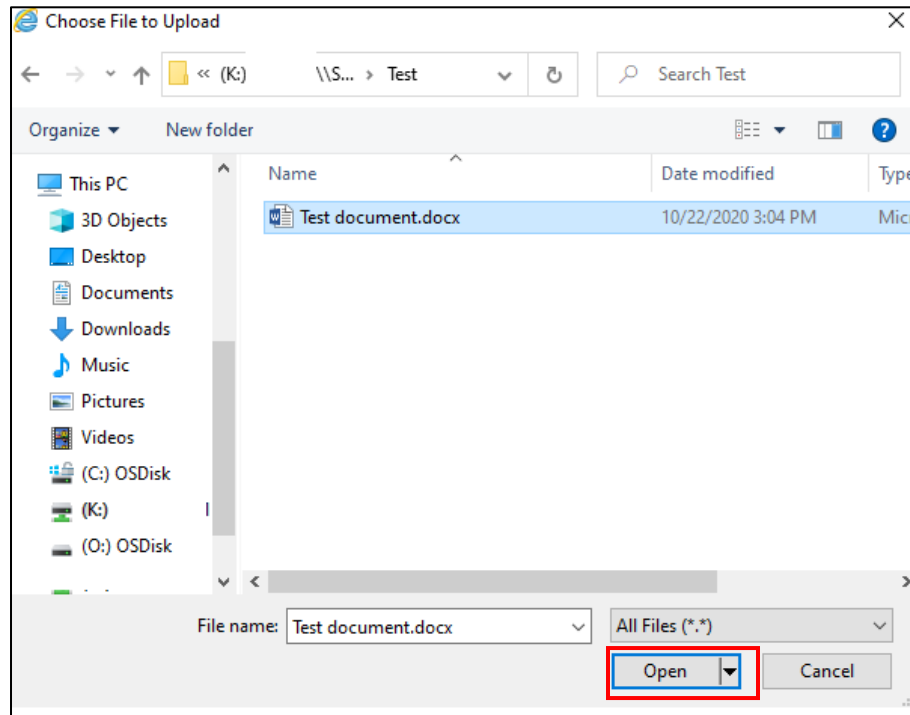
**Attach Files to Response**

- A maximum of 25 files can be added and all files must total less than 200MB.
- File types accepted: .wpd, .doc, .docx, .txt, .rtf, .xls, .xlsx, .pdf, .tiff, .tif.
- Please do not upload password-protected files because they cannot be processed.

Add Files:  **Browse...**

**Upload** [Cancel](#)

**Step 2:** Browse to location of the document you wish to upload and select **Open**.



You will be directed to the attach files to Response screen.

**Step 3:** Select a document type from the drop down list.

- Response to Medical or Vocational Interrogatory
- Resume of Medical or Vocational Expert

**Attach Files to Response**

- A maximum of 25 files can be added and all files must total less than 200MB.
- File types accepted: .wpd, .doc, .docx, .txt, .rtf, .xls, .xlsx, .pdf, .tiff, .tif.
- Please do not upload password-protected files because they cannot be processed.

**File 1:** ERE for Experts Demo.docx 18 KB

**Document Type:** [Dropdown menu]

**Document Date:** [Text input field] mm/dd/yyyy

**Notes:** [Text input field]

**Remove File**

**Add Files:** [Text input field] **Browse...**

**Upload** **Cancel**

- Additional fields (not mandatory for submission)
  - Document Date
  - Notes
- Other options:
  - Select **Remove File** if you wish to cancel.
  - Select **Add File** if you have an additional document to upload to the same claimant's eFolder.
  - Select **Upload** to submit your documents to the claimant's eFolder.

**Step 4:** The **Confirmation** screen acknowledges that SSA has received your submission. The submission must still go through an SSA systems check before being sent to the electronic folder. We will send you an email if there are any errors or problems that prevent SSA from processing your submission.

**NOTE:** We recommend that you print this confirmation page for your records. You will not be able to retrieve this information from OHO after you exit this page.

1 Add Files
2 Confirmation

Thank you for your submission.
 Upload New File Submission - Tracking Information  
 Tracking Number: **15775BA45404E6E8N**  
 Submitted on: **09/29/2016 at 07:35 AM EDT**  
 Please retain your tracking number in case there are errors or problems that prevent us from processing your submission.

Print this page

[User Resources](#)

### Submission Summary

Tracking Information

#### Destination Information

Site Code: **X72**  
 State: **Virginia**  
 Destination: **VA - Richmond OHO [X72]**  
 Claimant SSN  
 RF: **D**  
 DR: **S**

#### Uploaded File(s)

File Name	File Size
<b>File:</b> anotherPdf.pdf <b>Document Type:</b> Response to Vocational Interrogatory (RVOCINT) <b>Document Date:</b> 02/02/2002	4 KB

Notes: No notes added

Total File Size 4 KB

Return to eFolder

Submit Additional Files

ERE Home

Additional options:

- To upload additional documents select **Submit Additional Files** button.
- To return to ERE home page, select **ERE Home**.
- To return to the current file, select Return to eFolder.

## Track Status of Submissions

This feature allows you to view the status of the documents you uploaded to a claimant's eFolder. You can select from multiple search criteria. However, ERE can only supply information about submissions within the past 180 days.

## New Case Search

To access another claimant's eFolder, select the **New Case Search** button on the ERE: Electronic Folder screen. You will return to the **Electronic Folder Agreement** screen where you can enter another claimant SSN.

## Pick Up Files

Return to **ERE Home** and select the **Pick Up Files** link to check the status of your download requests. Follow the **Pick Up Files User Guide** in the **User Resources**.

JOHN CCAKDZS | Sign Out | Text Size | Accessibility Help

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### ERE: Pick Up Files

**Downloading Your Files** ? Help

- Select the claimant's Social Security Number (SSN) to download the file.
- The status will change to Downloaded.

**Files Will Automatically Be Deleted**

- 7 days after they are ready for download, even if you have not downloaded them.
- 24 hours after you begin the download process.

[? User Resources](#)

SSN (Last 4)	Last Name	File Type	Date & Time (ET) Requested	Status	File Deletion Date & Time (ET)
8108	Nicholson	PDF	10/21/2016 14:29	Ready for Download	10/28/2016 14:32

[ERE Home](#)

Do you want to open or save 9216\_157E8818D9FD952AN.pdf from secureval.ssa.gov?

Open Save Cancel x

Open, will open PDF that contains all the documents requested

Save popup at bottom of screen with options to open, open folder or view documents

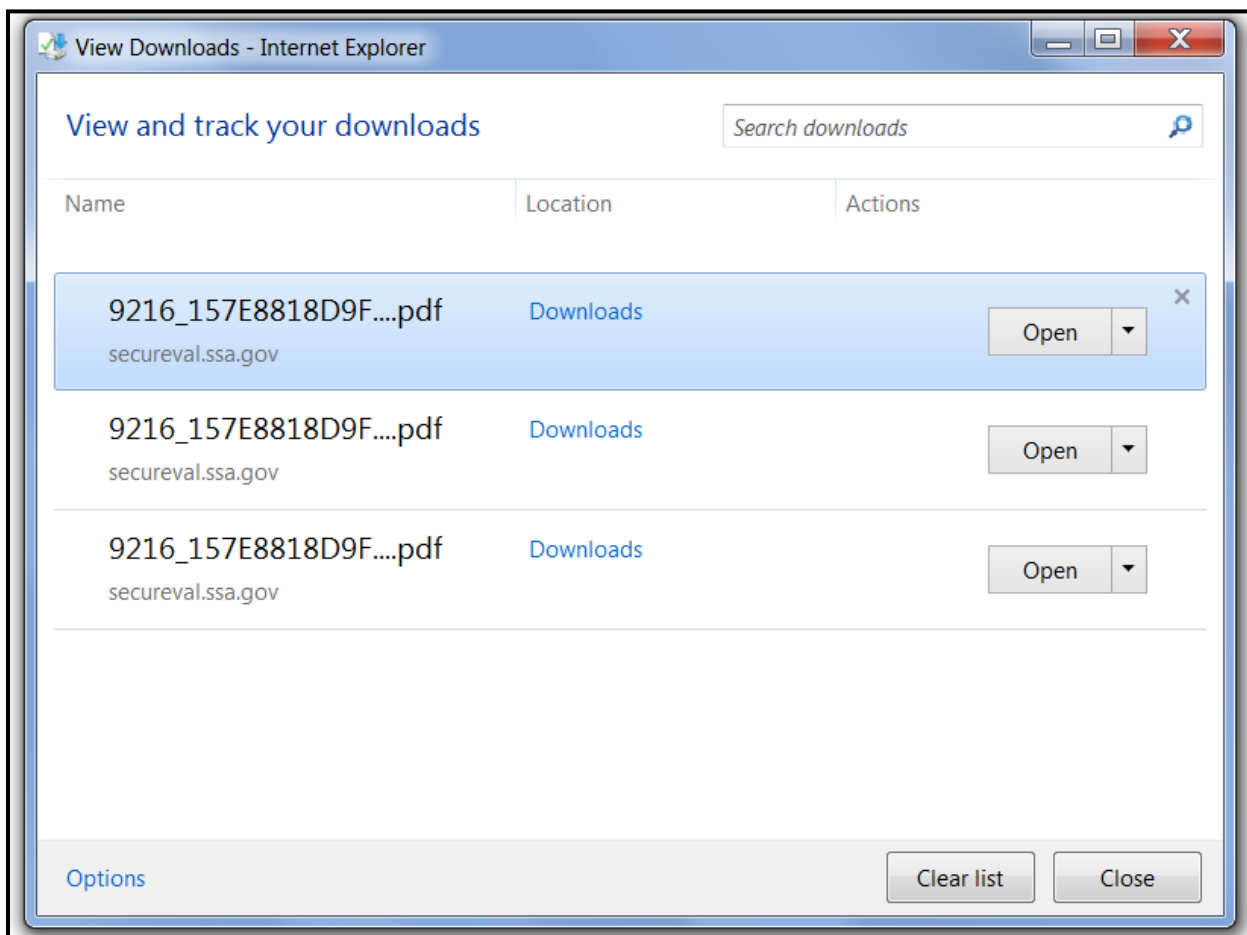




Open – opens up PDF that contains all documents requested

Open folder – takes you to download temp file and highlights the PDF folder. Double click on the PDF file and all documents requested open up in a PDF format

View Downloads opens up all downloaded files



## **Signing Out**

To end the ERE session, select the **Sign Out** button. This button is located on the upper left on most screens.

## ***Troubleshooting***

### **Unable to Access an eFolder**

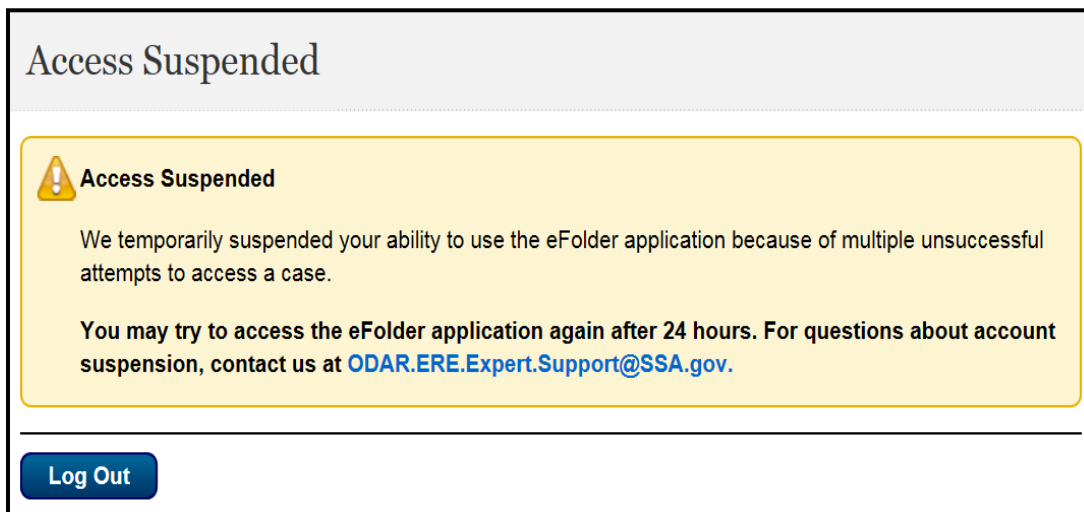
If you receive an **Access Denied** or **Unable to Process Your Request** message after entering the claimant SSN, the reason may be:

- You entered an incorrect SSN
- You are not assigned to this specific case
- The case is NOT electronic or pending at the Hearing level
- The Interrogatory has been received or the Hearing has been held

Verify that you entered the correct SSN and try again. If you receive another error message, we recommend you save a screen shot and email it, along with your contact information, to [OHO.ERE.Expert.Support@ssa.gov](mailto:OHO.ERE.Expert.Support@ssa.gov). Please DO NOT include SSNs in your email.

### **Access Suspended**

We automatically suspend your ERE eFolder access account if you have 10 unsuccessful attempts when entering a claimant SSN. Once suspended, you will have to wait 24 hours for your ERE account to be automatically unlocked.



If you enter an incorrect SSN more than three (3) times, we recommend that you stop and send an email to [OHO.ERE.Expert.Support@ssa.gov](mailto:OHO.ERE.Expert.Support@ssa.gov) . Do not include SSN's in your email correspondence.

## **Timing Out**

ERE will automatically log you out:

- After 30 minutes of inactivity - This is a safeguard to protect your ERE eFolder access account and the claimant's information. If this happens, you will have to sign into ERE again using the specialized link.
- After 2 hours of activity - This is another safeguard. If this happens, you will have to sign into ERE again using the specialized link.

## **Common Problems**

- Bookmarking - Never bookmark screens within ERE. The **only** bookmark you should use for ERE is for the sign-in screen at <https://secure.ssa.gov/ERECA/MEVE01View>.
- Back Button - DO NOT use the **Back** button or "X" out of your Internet browser. You should always use the **Sign Out** button at the top left of the ERE screen.